

USF

St. Petersburg

2013-14

Work Plan



University of South Florida St. Petersburg

Work Plan Presentation for 2013-14 Board of Governors Review



INTRODUCTION

The State University System of Florida has developed three tools that aid in guiding the System's future.

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.

The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2013-14 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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MISSION STATEMENT (What is your purpose?)

The University of South Florida St. Petersburg offers distinctive graduate and undergraduate programs in the arts and sciences, business, and education within a close-knit, student-centered learning community that welcomes individuals from the region, state, nation and world. We conduct wide-ranging, collaborative research to meet society's needs and engage in service projects and partnerships to enhance the university and community's social, economic and intellectual life. As an integral and complementary part of a multi-institutional system, USF St. Petersburg retains a separate identity and mission while contributing to and benefiting from the associations, cooperation, and shared resources of a premier national research university.

VISION STATEMENT (What do you aspire to?)

The University of South Florida St. Petersburg will be a premier masters degree level urban university recognized for its vibrant community of scholars who engage and improve its community and the world.

STATEMENT OF STRATEGY (How will you get there?)

Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.

USFSP's market is driven by its goal to be the masters comprehensive university of choice in the Tampa Bay region and beyond. Recognized by the Carnegie Foundation for the Advancement of Teaching as a community-engaged university, USFSP will continue its strategies of developing and delivering distinctive academic programs for both undergraduate and graduate students that reflect community and regional needs, of nurturing vibrant student-faculty interaction, and of providing student-centered support for curricular and co-curricular activities. It will pursue these strategies through careful financial and environmental stewardship and will utilize appropriate pedagogies, including traditional, mixed delivery and online. It will measure its success through a combination of internal and external measures, including student measures of academic performance, increased student degree completion, and measures of civic engagement.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities, opportunities and challenges for improvement?

USFSP's core capabilities include excellence in teaching using all forms of delivery, high levels of faculty-student interaction in research, student success, faculty achievement, entrepreneurial spirit, strong and collaborative community engagement, key partnerships, and high accountability for results. USFSP provides students with an intimate intellectual environment to facilitate their growth as active learners and instill life-long habits of the mind. USFSP has high potential for growth in enrollment, even as it retains its institutional character of close faculty-student interactions in the classroom, laboratory, and studio. Careful financial stewardship in a challenging fiscal environment has enabled strategic investments targeted at student success. Academic facilities are a key unmet need as well as financial aid for a student population that is increasingly needy.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.

1. Increase the percentage of residential students as a percent of the total student body.
 - Currently USFSP houses about 13% of its undergraduate student body in university housing.
 - National research shows that increased residential living promotes higher retention, greater student participation in co-curricular activities; and higher graduation rates

To reach this goal, USFSP opened 200 additional residential spaces in 2012 increasing the overall residential student numbers by 57%. In 2013-14 USFSP will increase its focus on the residential experience as a co-curricular activity and will continue to assess potential for increased residential living.

2. Enhance the number and quality of the faculty ranks at USFSP. In order to set the stage for a long future of high quality academic programs, particularly at the graduate level, as well as scholarly productivity and national recognition, USFSP will recruit additional full-time faculty in key disciplines. This will facilitate the continued enhancement of the student experience through increased opportunities for faculty mentorship of student research, including graduate theses; increased engagement of faculty with the community; and increased student retention and degree completion.

3. Refine the strategic enrollment plan developed in 2012-13 and develop and implement a focused initiative for greater student retention and graduation. This will be a coordinated effort involving numerous constituencies and organizational units, including academic advising, tutoring services, wellness and counseling, admissions, residential life and education, student life and engagement, institutional effectiveness, and all academic units.



KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'¹, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

¹ The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (2006-07 to 2011-12)	2011-12 ACTUAL	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Academic Quality					
National Ranking for University and Programs					
USFSP continues to be ranked highly among regional public universities in the south by US News and World Reports. COB's new global business professor is ranked 10 th most prolific scholar; and USFSP continues to seek membership in national honor societies and both the disciplinary and institutional levels.					
Avg. SAT Score (for 3 subtests)	.4%Δ ¹	1602	1605	1610	1620
Avg. High School GPA	0%Δ	3.5	3.5	3.58	3.65
Professional/Licensure Exam					
First-time Pass Rates²					
Exams Above National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Exams Below National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2013.			
SUBTOTAL OF IMPROVING METRICS	1/2	1/2	2/2	2/2	2/2
Operational Efficiency					
Freshman Retention Rate	5%Δ	72%	73%	74%	79%
FTIC Graduation Rates					
In 4 years (or less)	6%Δ	27%	32%	36%	45%
In 6 years (or less)	-.03%Δ	30%	32%	33%	35%
AA Transfer Graduation Rates					
In 2 years (or less)	-4%Δ	27%	32%	36%	44%
In 4 years (or less)	7%Δ	59%	60%	61%	63%
Percent of Bachelor's Degrees Without Excess Hours	N/A	55%	57%	60%	63%
Average Time to Degree (for FTIC)	-1%Δ	4.4 yrs	4.0 yrs	4.0 yrs	4.0 yrs
SUBTOTAL OF IMPROVING METRICS	3/6	7/7	6/7	6/7	6/7
Return on Investment					
Bachelor's Degrees Awarded	.12%Δ	730	750	760	780
Percent of Bachelor's Degrees in STEM	0%Δ	7%	10%	12.5%	20%
Graduate Degrees Awarded	0%Δ	144	144	148	168
Percent of Graduate Degrees in STEM	100%Δ	7%	9%	10%	15%
Percent of Baccalaureate Graduates Employed in Florida	-3%Δ ³	73% ³	73%	73%	73%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	-2%Δ ³	16% ³	16%	16%	16%
Annual Gifts Received (\$M)*	n/a	Data reported in the USF Work Plan			
Endowment (\$M)*	n/a	Data reported in the USF Work Plan			
SUBTOTAL OF IMPROVING METRICS	2/6	3/6	4/6	4/6	4/6
TOTAL OF IMPROVING METRICS	6/14	11/15	12/15	12/15	12/15

Notes: (1) SAT trends are based on 4 years, (2) Professional licensure pass rates are based on the 2011-12 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2010-11 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL ¹	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Academic Quality					
Faculty Awards	%Δ	x	x	X	x
National Academy Members	%Δ	x	x	X	x
Number of Post-Doctoral Appointees	%Δ	xx ²	xx	Xx	xx
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	x of 8	x of 8	x of 8	x of 8
SUBTOTAL OF IMPROVING METRICS	x		x	X	x
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	%Δ	\$ xx.x M	\$ xx.x M	\$ xx.x M	\$ xx.x M
Science & Engineering Research Expenditures (\$M)	%Δ	\$ xx.x M	\$ xx.x M	\$ xx.x M	\$ xx.x M
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences (\$M)	%Δ	\$ xx.x M	\$ xx.x M	\$ xx.x M	\$ xx.x M
Percent of Research Expenditures funded from External Sources	%Δ	xx%	xx%	xx%	xx%
Patents Issued	%Δ	x	x	X	x
Licenses/Options Executed	%Δ	x	x	X	x
Licensing Income Received (\$M)	%Δ	\$ x.x M	\$ x.x M	\$ x.x M	\$ x.x M
Number of Start-up Companies	%Δ	x	x	X	x
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	NR-FR ³	n/a	n/a	n/a
Research Doctoral Degrees Awarded	%Δ	xx ³	xx	Xx	xx
Professional Doctoral Degrees Awarded	%Δ	xx ³	xx	Xx	xx
SUBTOTAL OF IMPROVING METRICS	x		x	X	x
TOTAL OF IMPROVING METRICS	x		x	X	x

Notes: (1) 2011-12 data is not yet available for most of these metrics, so data is based on the 2010-11 year unless indicated otherwise; (2) the most recent Post-Doctoral Appointee data is Fall 2009; (3) indicates 2011-12 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Bachelor's Degrees Awarded to Minorities	Number of Faculty Designated a Highly Cited Scholar
Number of Adult (age 25+) Undergraduates Enrolled	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Percent of Course Sections Offered via Distance and Blended Learning	Percentage of Students Participating in Identified Community and Business Engagement Activities
	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2006-07 to 2011-12)	2011-12 ACTUAL	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Bachelor's Degrees in Areas of Strategic Emphasis	65%Δ	178	200	200	225
Percent of Course Sections Offered via Distance and Blended Learning	Not avail.	16%	19%	22%	25%
Maintain Carnegie Community Engagement Classification	100%*				

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

Goal 1. *Improve baccalaureate retention and graduation (USF System Goal 1); USFSP will focus on improving student outcomes in key mathematics courses through continued implementation of its Quality Enhancement Plan; focus on improving access to academic support (i.e., tutoring); continued emphasis on strengthening academic advising.*

Metric: Increase 6-year FTIC baccalaureate graduation rate	0%Δ	30%	32%	33%	35%
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*USFSP earned this designation in 2011-12 and will retain this designation through 2015, the next application cycle.



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	2013-14 Appropriations
Education & General – Main Operations						
State Funds	\$ 26.1	\$ 24.6	\$ 24.4	\$ 21.0	\$ 15.9	n/a
Tuition	\$ 10.7	\$ 12.9	\$ 14.7	\$ 17.8	\$ 21.2	n/a
TOTAL MAIN OPERATIONS	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.8	\$ 37.1	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL HSC	n/a	n/a	n/a	n/a	n/a	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.8	\$ 37.1	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

Auxiliary Enterprises

Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	USF System Level	\$8,207,956	\$13,154,977	n/a
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Contracts & Grants

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues	USF System Level	\$3,228,779	\$3,750,000	n/a
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Local Funds

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	USF System Level	\$3,875,688	\$4,472,932	n/a
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Faculty Practice Plans

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues	n/a	n/a	n/a	n/a	n/a	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	USF System Level					
UNIVERSITY REVENUES GRAND TOTAL	n/a	n/a	n/a	\$ 54.1	\$ 58.5	n/a



FISCAL INFORMATION (continued)

Undergraduate Resident Tuition Summary *(for 30 credit hours)*

	FY 2011-12 ACTUAL	FY 2012-13 ACTUAL	FY 2013-14 REQUEST	FY 2014-15 PLANNED	FY 2015-16 PLANNED
Base Tuition	\$3,100	\$3,100	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$643	\$1,054	\$1,054	\$1,054	\$1,054
Percent Increase	15%	11%	1.3%	0%	0%
Required Fees¹	\$,1457	\$1,562	\$1,615	\$1,615	\$1,615
TOTAL TUITION AND FEES	\$5,199	\$5,716	\$5,821	\$5,821	\$5,821

Note 1: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

Student Debt Summary

	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ESTIMATE
Percent of Bachelor's Recipients with Debt	42%	40%	48%	48%	48%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$20,181	\$20,827	\$22,836	\$24,096	\$24,000
Student Loan Cohort Default Rate (2nd Year)*	7.0%	6.8%	5.5% draft	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)*	9.8%	n/a	n/a	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

*USF System data

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2012-13)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,716	\$1,000	\$8,960	\$1,600	\$2,500	\$19,776
AT HOME	\$5,716	\$1,000	\$4,480	\$1,600	\$2,500	\$15,296

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2012-13)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	757	37%	\$11,450	-\$2,227	\$7,485	\$4,468
\$40,000-\$59,999	262	13%	\$13,576	\$291	\$4,970	\$3,777
\$60,000-\$79,999	208	10%	\$15,010	\$2,209	\$3,141	\$4,155
\$80,000-\$99,999	190	9%	\$15,452	\$2,869	\$2,612	\$4,477
\$100,000 Above	457	23%	\$16,463	\$3,448	\$1,860	\$3,057
Missing	163	8%	\$19,464	\$5,206	\$139	\$129
TOTAL	2,037	100%	AVERAGE \$14,226	\$899	\$4,414	\$3,684

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2013. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2013

Effective Date	
University Board of Trustees approval date:	
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$35.14
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2013-14 (projected):	\$0
Total differential fee revenue generated in 2013-14 (projected):	\$3,599,109
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> •Need-Based Financial Aid (at 40%): Expand access for students; and accelerated path to graduation. Provide much needed financial support for talented students with limited income. •Expanding the High Skilled Workforce and Supporting Job Placement: Expanded degree production in Areas of Strategic Emphasis; Strengthened relationships with business and industry; Increased number of internships; Expanded professional support for job placement through USFSP's Career Center. •Academic Advising: Enhanced academic advising through technology and additional professional staff; focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours. Improved tracking of students and graduates. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
Request to Modify or Waive Tuition Differential Uses	
<p>(pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2012-13 academic year.

2012-2013 - 60% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Improve graduation rates through QEP implementation	Two new faculty hired to support QEP; revised implementation plan to enhance student success; enhanced tutoring; increase in FTIC graduation rate
Increase faculty/student research and creative activity	Research funding at all-time high. Increased student presentations, research posters and papers and student research awards. First national student research award.
Enhanced undergraduate programs	New degree in Biology launched, new faculty in Education, senior faculty in Business
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	26
Total Number of Advisors Hired or Retained (funded by tuition differential):	2
Total Number of Course Sections Added or Saved (funded by tuition differential):	110
2012-2013 - 40% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Expand access for students and accelerated path to graduation	Two senior students were incentivized to graduate in four years with a \$2,500 grant which will repay \$2,500 in student loans if the student graduated in spring 2013. Awards will be made once degree verification can be confirmed.
Provide financial support for students with limited income	Larger USF need based grant awards were made to students based on their academic potential and USF academic record.
More students supported with financial aid scholarships and reduced loan indebtedness	The number of students receiving a need based grant increased from 509 to 809, or by 59%.
Additional Information (estimates as of April 30, 2013):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	809
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,308
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	250
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2,500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2012-13 AND 2013-14

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)

	Estimated Actual* 2012-13 -----	Estimated 2013-14 -----
<u>FTE Positions:</u>		
Faculty	25.06	32.0.
Advisors	2.00	4.0.
Staff	8.08	8.0.
Total FTE Positions:	35.06	44.0
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 475,306	\$ 513,586
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ 475,306	\$ 513,586
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 3,472,400	3,599,109
Interest Revenue - Current Year	2,000	2,070
Interest Revenue - From Carryforward Balance	1,000	1,035
Total Receipts / Revenues:	\$ 3,480,400	\$ 3,602,214
<u>Expenditures</u>		
Salaries & Benefits	\$ 1,775,264	\$ 2,379,514
Other Personal Services	-	-
Expenses	12,000	12,000
Operating Capital Outlay	-	-
Student Financial Assistance	1,179,856	1,221,150
Expended From Carryforward Balance	475,000	500,000
**Other Category Expenditures	-	-
Total Expenditures:	\$ 3,442,120	\$ 4,112,664
Ending Balance Available:	\$ 513,586	\$ 3,136

*Since the 2012-13 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University of South Florida - St. Petersburg									
<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>					
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	
Tuition:									
Base Tuition -	\$95.67	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07	
Tuition Differential (no more than 15%)	\$12.80	\$21.42	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14	
Total Base Tuition and Differential	\$108.47	\$124.74	\$138.46	\$140.21	\$140.21	\$140.21	\$140.21	\$140.21	
% Change	15.0%	15.0%	11.0%	1.3%	0.0%	0.0%	0.0%	0.0%	
Fees (per credit hour):									
Student Financial Aid ¹	\$4.78	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25	
Building/Capital Improvement ²	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	
Activity & Service	\$24.80	\$24.80	\$25.05	\$25.63	\$25.63	\$25.63	\$25.63	\$25.63	
Health	\$1.20	\$2.64	\$3.90	\$4.90	\$4.90	\$4.90	\$4.90	\$4.90	
Athletic	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	
Transportation Access	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	
Technology ¹	\$4.78	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25	
Student Green Energy		\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00	
Sub total (credit hour fees)	\$45.02	\$48.22	\$51.73	\$53.49	\$53.49	\$53.49	\$53.49	\$53.49	
Total Tuition and Fees per credit hour	\$153.49	\$172.96	\$190.19	\$193.70	\$193.70	\$193.70	\$193.70	\$193.70	
% Change	24.4%	12.7%	10.0%	1.8%	0.0%	0.0%	0.0%	0.0%	
Fees (block per term):									
Activity & Service									
Health									
Athletic	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	
Transportation Access									
Total Block Fees per term	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	
% Change	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Total Tuition for 30 Credit Hours	\$3,254.10	\$3,742.20	\$4,153.80	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	
Total Fees for 30 Credit Hours	\$1,360.60	\$1,456.60	\$1,561.90	\$1,614.70	\$1,614.70	\$1,614.70	\$1,614.70	\$1,614.70	
Total Tuition and Fees for 30 Credit Hours	\$4,614.70	\$5,198.80	\$5,715.70	\$5,821.00	\$5,821.00	\$5,821.00	\$5,821.00	\$5,821.00	
\$ Change	\$901.80	\$584.10	\$516.90	\$105.30	\$0.00	\$0.00	\$0.00	\$0.00	
% Change	24.3%	12.7%	9.9%	1.8%	0.0%	0.0%	0.0%	0.0%	
Out-of-State Fees									
Out-of-State Undergraduate Fee	\$343.16	\$291.68	\$315.00	\$346.50	\$346.50	\$346.50	\$346.50	\$346.50	
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$14.58	\$15.75	\$17.32	\$17.32	\$17.32	\$17.32	\$17.32	
Total per credit hour	\$360.31	\$306.26	\$330.75	\$363.82	\$363.82	\$363.82	\$363.82	\$363.82	
% Change	0%	-15%	8%	10%	0%	0%	0%	0%	
Total Tuition for 30 Credit Hours	\$3,254.10	\$3,742.20	\$4,153.80	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	
Total Fees for 30 Credit Hours	\$12,169.90	\$10,644.40	\$11,484.40	\$12,529.30	\$12,529.30	\$12,529.30	\$12,529.30	\$12,529.30	
Total Tuition and Fees for 30 Credit Hours	\$15,424.00	\$14,386.60	\$15,638.20	\$16,735.60	\$16,735.60	\$16,735.60	\$16,735.60	\$16,735.60	
\$ Change	\$901.80	-\$1,037.40	\$1,251.60	\$1,097.40	\$0.00	\$0.00	\$0.00	\$0.00	
% Change	6.2%	-6.7%	8.7%	7.0%	0.0%	0.0%	0.0%	0.0%	
Housing/Dining									
% Change		#DIV/0!	#REF!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	



ENROLLMENT PLANNING

Planned Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2006-07 to 2011-12)	2011-12 ACTUAL HEADCOUNT		2013-14 PLANNED HEADCOUNT		2014-15 PLANNED HEADCOUNT		2015-16 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	69%Δ	606	33%	758	39%	785	39%	812	39%
FTIC (Profile Admit)	88%Δ	9	1%	15	1%	16	1%	16	1%
AA Transfers*	12%Δ	723	39%	727	38%	752	38%	778	38%
Other Transfers	15%Δ	497	22%	426	22%	441	22%	456	22%
Subtotal	30%Δ	1835	100%	1927	100%	1994	100%	2062	100%
GRADUATE STUDENTS									
Master's	16%Δ	214	100%	293	100%	303	100%	314	100%
Research Doctoral	0%Δ	n/a	xx%	n/a	xx%	n/a	xx%	n/a	xx%
Professional Doctoral	0%Δ	n/a	xx%	n/a	xx%	n/a	xx%	n/a	xx%
Subtotal	16%Δ	214	100%	293	100%	303	100%	314	100%
NOT-DEGREE SEEKING	-13%Δ	220		229		232		240	
MEDICAL	0%Δ	n/a		n/a		n/a		n/a	
TOTAL	29%Δ	2269		2449		2529		2616	

Note*: AA transfers refer only to transfers from the Florida College System.

Planned Growth by Method of Instruction *(for all E&G students at all campuses)*

	5 YEAR TREND (2006-07 to 2011-12)	2011-12		2013-14		2014-15		2015-16	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	320%Δ	858	30%	875	30%	920	30%	952	30%
HYBRID (50%-79%)	0%Δ	23	1%	234	8%	337	11%	444	14%
TRADITIONAL (<50%)	5%Δ	1941	69%	1809	62%	1808	59%	1776	56%
TOTAL	38%Δ	2821	100%	2961	100%	3065	100%	3172	100%
GRADUATE									
DISTANCE (80%)	320%Δ	87	33%	72	26%	75	26%	78	26%
HYBRID (50%-79%)	0%Δ	2	1%	14	5%	23	8%	33	11%
TRADITIONAL (<50%)	-14%Δ	177	66%	191	69%	192	66%	189	63%
TOTAL	18%Δ	267	100%	280	100%	290	100%	300	100%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for *no more* than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2012-13	Estimated Actual 2012-13	Funded 2013-14	1 st Year Estimated 2013-14	2 nd Year Planned 2014-15	3 rd Year Planned 2015-16	4 th Year Planned 2016-17	5 th Year Planned 2017-18	5-Year Projected Average Annual Growth Rate
Florida Resident									
LOWER	657	1071	657	1108	1147	1187	1230	1274	3.5%
UPPER	1486	1717	1486	1777	1839	1904	1970	2039	3.5%
GRAD I	227	264	227	273	283	293	302	312	3.5%
GRAD II	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	2370	3052	2370	3159	3269	3384	3502	3625	3.5%
Non- Resident									
LOWER	0	33	0	34	41	44	45	46	3.5%
UPPER	0	40	0	41	38	40	41	42	3.5%
GRAD I	0	7	0	7	7	8	9	10	3.5%
GRAD II	0	n/a	0	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	0	80	0	83	86	92	95	98	3.5%
TOTAL									
LOWER	657	1104	657	1143	1188	1232	1275	1320	3.5%
UPPER	1486	1757	1486	1818	1877	1943	2011	2081	3.5%
GRAD I	227	271	227	228	290	301	311	322	3.5%
GRAD II	0	n/a	0	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	2370	3132	2370	3242	3355	3476	3598	3724	3.5%
TOTAL (US FTE)	3160	4175	3160	4321	4472	4629	4791	4959	3.5%

Medical Student Headcounts *(FTE does not apply)*

Medical Doctorate									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
Dentistry									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
Veterinary									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
Pharmacy									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2013-14 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Master of Accountancy	52.0301	No	UF, FSU, FAU, FIU, UCF, UNF	No	60	December 2013
DOCTORAL PROGRAMS						

New Programs To Be Considered by University in 2014-16 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
B.S. Marine Science	40.0607 or 26.1302	STEM	FIU, UWF	No	50	March 2015
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Non-Profit Leadership and Management	52.0206	No	FAU, UCF, UWF	Partial	30	March 2015
Education Specialist (Special Ed/ESOL)	13.1001	Education	FSU, UF	Partial	30	March 2016
DOCTORAL PROGRAMS						



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score (for 3 subtests)	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted & Registered FTIC (B,E) students (Fall only).
Avg. HS GPA	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2011-12 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2013 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2011-12 Accountability report (table 4B) – see link .
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	As reported in the 2011-12 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	As reported in the 2011-12 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	As reported in the 2011-12 Accountability report (table 4J), the percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. This metric computes total academic credit (minus exemptions per 1009.286, F.S.) as a percentage of catalog hours required for the students major.
Average Time to Degree (for FTIC)	This metric is the number of years between the start date (using the student's entry date) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year. The student type is based on student type at time of entry.



Return on Investment

Bachelor's Degrees Awarded	This is a count of baccalaureate degrees awarded as reported in the 2011-12 Accountability Report (table 4G) – see link .
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2011-12 Accountability Report (table 4H) – see link .
Graduate Degrees Awarded	This is a count of graduate degrees awarded as reported in the 2011-12 Accountability Report (table 5B) – see link .
Percent of Graduate Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2011-12 Accountability Report (table 5C) – see link .
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data – see link .
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data – see link .
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).

Goals Specific to Research Universities

Academic Quality

Faculty Awards

National Academy Members

Number of Post-Doctoral appointees

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at link), but now data must be queried via WebCASPAR – see link .
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey and the 2011-12 Accountability Report – see link .
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see link , table 36 <i>minus</i> table 52), but now data must be queried via WebCASPAR – see link .
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds) as reported in the 2011-12 Accountability Report (table 6A) – see link .
Patents Issued	The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A) – see link .
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A) – see link .
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2011-12 Accountability Report (table 6A) – see link .
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2011-12 Accountability Report (table 6A) – see link .
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually as reported in the 2011-12 Accountability Report (table 5B) – see link .
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually as reported in the 2011-12 Accountability Report (table 5B) – see link .